

Individual stress risk assessment template

Employers have a duty of care to protect workers' health - including mental health - under the Health and Safety at Work Act, and a duty to assess risks to health under the Management of Health and Safety at Work Regulations, so foreseeable work-related stress belongs in a risk assessment like any other hazard. The recommended framework is the HSE Management Standards: six areas of work design - Demands, Control, Support, Relationships, Role and Change - that are linked to stress when poorly managed (see also Acas on managing work-related stress). The template below works through all six for one person, ending each with agreed actions and a review date.

What an individual stress risk assessment must cover

An organisational stress risk assessment looks at roles and teams in general; an individual assessment is for a specific person showing signs of stress - they've told you, a manager has noticed, a fit note mentions stress, or a return-to-work interview has flagged pressure. It must be done with the person, not to them; it must cover each of the six Management Standards areas rather than just the loudest one; and every identified pressure must end in an agreed action with an owner and a review date, or the exercise is a listening session with a filing step. Use the form as the agenda for a private, unhurried conversation.

The template

Copy everything from here to section 9 into a document or your HR system. Complete it jointly - employee and manager - and replace each [bracketed placeholder]. Sections 2-7 repeat the same four prompts across the six HSE areas.

1. Details

Employee: [name, role]. Manager completing the assessment with them: [name]. Date: [date]. Reason for assessment: [employee raised concerns / manager observation / return from stress-related absence / fit note mentions stress / follow-up review]. Agreed review date for the whole assessment: [date, typically 4-6 weeks]. This document is confidential to the employee, their manager and [HR].

2. Demands - workload, pace, hours and environment

Current situation: [how the employee describes their workload, deadlines, hours and working environment]. What's contributing: [e.g. sustained peak workload, unrealistic deadlines, long hours, understaffing, physical environment]. Agreed actions: [e.g. reprioritise or remove tasks, redistribute work, agree realistic deadlines, cap out-of-hours contact - with an owner for each]. Review date: [date].

3. Control - how much say they have over how they work

Current situation: [how much influence the employee has over pace, methods, breaks and when they work]. What's contributing: [e.g. micro-management, rigid processes, no say in scheduling]. Agreed actions: [e.g. agree areas of genuine autonomy, involve them in planning their own work, flexible start/finish times]. Review date: [date].

4. Support - from the organisation, manager and colleagues

Current situation: [what support the employee feels they get, and what's missing]. What's contributing: [e.g. infrequent 1:1s, no feedback, feeling unable to raise problems, unaware of available help]. Agreed actions: [e.g. regular 1:1s restored, named point of contact, signpost EAP/occupational health, check-ins during absence]. Review date: [date].

5. Relationships - conflict, behaviours and fairness

Current situation: [how working relationships are, including any conflict or unacceptable behaviour]. What's contributing: [e.g. unresolved conflict, bullying or harassment concerns, isolation from the team]. Agreed actions: [e.g. facilitated conversation, mediation, formal route under the dignity-at-work policy where needed - never require the employee to simply tolerate it]. Review date: [date].

6. Role - clarity and conflicting expectations

Current situation: [whether the employee is clear what's expected of them, and by whom]. What's contributing: [e.g. conflicting instructions from different stakeholders, an expanded role that was never redefined, unclear priorities]. Agreed actions: [e.g. rewrite and agree the role's priorities, single source of direction, clarify decision rights]. Review date: [date].

7. Change - how organisational change is managed and communicated

Current situation: [what change the employee is experiencing - restructure, new systems, new management - and how it's landing]. What's contributing: [e.g. uncertainty about their job, changes announced without consultation, rumour filling an information vacuum]. Agreed actions: [e.g. honest timeline of what's known, regular updates even when nothing has changed, involvement in decisions that affect their work]. Review date: [date].

8. Overall summary and immediate safeguards

The areas of greatest concern are: [list]. Immediate adjustments while actions take effect: [e.g. temporary workload reduction, adjusted hours, agreed time off]. Where absence is involved: [return-to-work arrangements / phased return plan]. If there is any indication of risk to the employee's health beyond what these actions address, refer to [occupational health / GP / EAP] - this form is a management tool, not a clinical one.

9. Sign-off and review

Agreed by employee: [name, date]. Manager: [name, date]. Copy held by: [HR, confidentially]. At each review, record for every action: [done / in progress / not done - and why], update the assessment, and set the next review date. Repeated flags in the same area across several individual assessments should be escalated to [HR / senior leadership] as an organisational risk, not a personal one.

How to adapt it

Honest guidance on making this work in practice:

- Do it with the person, never to them. The employee's own words belong in "current situation". A manager filling the form in alone records the wrong problems and produces actions nobody owns - the Acas guidance is emphatic that talking to the person is the starting point.
- Only promise actions you control. "Reduce workload" written by a manager who can't actually remove work is worse than nothing - it converts hope into evidence of inaction. Small, kept promises beat grand, broken ones.
- The review date is the template's most important field. Most stress assessments fail at the follow-up, not the form. Book the review meeting when you sign the form, and record honestly what happened to each action.
- Watch for patterns. Three people in one team flagging Demands isn't three coincidences - it's an organisational finding under the same Management Standards, and it belongs with leadership. Pair the individual form with team-level signals like absence patterns (see our Bradford factor guide - and its limits).
- Know the form's boundaries. This is a management tool, not a diagnosis, and it isn't legal advice. Where stress may amount to a disability, Equality Act reasonable-adjustment duties apply on top; where health risk is serious, involve occupational health. Regular 1:1s are the cheapest early-warning system you can run.
- Handle performance separately and carefully. If underperformance and stress are tangled together, address the stress first - a PIP launched at someone whose assessment actions were never delivered is unfair and looks it.

Running it day to day

The assessments that work sit inside a rhythm, not a drawer: absence tracking that prompts a proper return-to-work conversation, regular documented 1:1s, and team-level wellbeing signals that stay aggregated and anonymous rather than pointing at individuals. That's the shape CoDash is built around - see engagement and voice and time off and absence.

A free template from CoDash - codash.co.uk/templates. Edit it to match how your company actually works, and take advice on anything unusual.